Project Overview

FGL Sports   
ManagersWeb a.k.a. Ops Portal rebuild

**January 20, 2016**

**Delivery:** February 2016

****

****

**Version Control**

|  |  |  |
| --- | --- | --- |
| **Version** | **Description** | **Date** |
| 1.0 | Provide an overview of release schedule for new Communications Site   * User Stores * User Interface Mock Up V1.0 * Presented to Ops Team | 2015/12/07 |
| 1.1 | Added in technical requirements from COE on VM and Server builds | 2015/12/09 |
| 1.2 | * Reformatting * Additional mockups added | 2015/12/15 |
| 1.3 | Added in a WBS | 2015/12/15 |
| 1.5 | Version for Tech Planning and OA creation | 2016/01/06 |
| 1.6 | * Changed document Title to *Project Overview* * Edits to Release 1.0 Feature Set * Added Release 1.1 details | 2016/01/20 |

**Stakeholders**

|  |  |
| --- | --- |
| **Name** | **Title / Role** |
| Paul Reid | Exec Sponsor |
| Cam Munro | AVP Store Communications |
| Micah Kalen | AVP Digital Ops |
| Daryl Suttie | Manager Digital Ops / Project Lead |
| Brent Garner | Developer Ops |
| Megha Jyoti | Developer Ops |
| TBD | Deployment Manager |
| Rob Petrollini | Communications Manager |
| Mike Gedleman | Tech Planning |

Table of Contents

[Overview and History 4](#_Toc441068253)

[Technical Requirements 4](#_Toc441068254)

[Hardware 4](#_Toc441068255)

[Operating System & Web Server 4](#_Toc441068256)

[Database & Application Programming Language 4](#_Toc441068257)

[Network 5](#_Toc441068258)

[High-Level Feature Sets 5](#_Toc441068259)

[Release 1.0 - Narrow release 5](#_Toc441068260)

[Release 1.1 - System-wide release 5](#_Toc441068261)

[Release 2 (TBD) 5](#_Toc441068262)

[Release 3 (TBD) 5](#_Toc441068263)

[User Stories - Release 1 6](#_Toc441068264)

[As a Content Manager 6](#_Toc441068265)

[As Communications Manager 7](#_Toc441068266)

[As a User 9](#_Toc441068267)

[Sample Mockups - Release 1.0/1.1 11](#_Toc441068268)

# Overview and History

This project seeks to rebuild and progressively enhance the current application, focusing on usability, extensibility and compatibility with multiple platforms/contexts (e.g. desktop, tablet, mobile).

When the current Ops Portal was first launched in August 2014, it was only intended as an interim solution for an ongoing problem: how do we effectively digitally deliver operational store documents more efficiently?

Prior to the launch, relevant communications and documents were delivered exclusively as emails and attachments. Stores were left to handle and organize these documents on their own.

The Ops Portal provides a consistent, structured and reliable repository for these same documents today, but over time its limitations have become increasingly apparent.

The Portal offers these features:

* Core functionality allows documents to be pushed out to users at all stores
* Document categories and subcategories align with in-store process and cadence
* Notifications area surfaces most recently added docs

These opportunities have become apparent:

* No search
* Document categories presented arbitrarily
* Rigid document hierarchy
* Critical communications (Alerts) not front and centre
* Various other usability concerns
* Documents shared across banners managed and presented independently
* Tablet/touch functional, not tablet friendly
* Content isn’t “store-aware”
* Only one “view” of the content (folder structure)

# Technical Requirements

## Hardware

* Standard Silver build
  + 2 vCPU
  + 8 GB RAM
  + 100 GB HDD

## Operating System & Web Server

* Red Hat Enterprise Linux (RHEL) 7.1 (SpecOps currently building a 7.1 “golden image is release” for POS
* Apache

## Database & Application Programming Language

* MySQL Server CALMYS1DB01 (pre-existing)
* PHP 6.1

## Network

* VMs to be deployed at FGL-HO, with the understanding they will migrate to WDC as part of FGL Stratus in the future
* Connectivity to CALMYS1DB01 on TCP/3306 is required (firewall changes if required
* Weekly full backup of the PROD system
* The Operations Team will be responsible for the OS & underlying hardware
* The DEV team will be responsible for all mods, including;
  + PHP Extensions
  + Code Base
  + Configuration of the Apache & related engine
  + It is understood that SUDO will be used by the DEV team, as Operations retains strict control over the use of root
  + DNS changes will be done LAST, after Brent & Jyoti confirm the new VMs are running correctly

# High-Level Feature Sets

## Release 1.0 - Narrow release

* Improved workflows for admins
* Searchable\* content
* Capability to replace certain Communications emails
* Customized document structure/hierarchy
* Tablet-friendly
* “Store-aware” content
* Content Features (e.g. Holiday)
* Video content-capable
* Overall Usability enhancements
* Calendar

## Release 1.1 - System-wide release

* Ongoing cosmetic improvements
* Release 1.0 feedback/fixes

## Release 2 (TBD)

* Individual logins **→ Resources & Process required to manage**
* User dashboards (set favourite locations, documents)
* Site use analytics (who’s clicking what how often)
* Analytics Reporting
* User management & reporting admin

## Release 3 (TBD)

* Permission levels added to profiles
* Self-, Peer-, Manager-assignable tasks
* Task tracking visibility for Managers, Head Office
* Additional Reporting: Tasks
* HTML-based Templates to replace select PDFs **→ Training, new skillsets required to manage**

# User Stories - Release 1

### As a Content Manager

|  |  |  |
| --- | --- | --- |
| **Category** | **Story** | **Feature(s)** |
| Folder mgmt. | I should be able to create folders and subfolders. |  |
| Folder/Document mgmt. | Folders should be able to contain folders and documents. |  |
| Folder mgmt. | I should be able be able to name folders whatever I want. |  |
| Folder mgmt. | I should be able to create sets of pre-defined folders to align with the week-numbered cadence of document delivery.   * These folders should be visible within a 3-, 5-, or 7-week rolling window. e.g. if the created folder collection is set to 7 weeks, on week 43, weeks 40-46 should be visible to the administrator. |  |
| Folder mgmt. | I should be able to disable a folder’s visibility to users without deleting it. | Folder-level visibility toggle |
| Folder mgmt. | I should be able to rename folders. | Folder rename |
| Folder mgmt. | I should be able to delete folders. | Folder delete |
| Folder mgmt. | I should be able to delete folders even if they contain subfolders and/or files.   * I should be explicitly warned if I’m trying to delete a non-empty folder. | Folder delete warning |
| Folder/Document mgmt. | I should be able single out or “package” files, folders and/or subfolders independent of the default folder structure.   * Folders and documents are created as part of normal document delivery, but particular subsets of the documents are sometimes worth grouping or presenting in a manner independent of the default structure. e.g. Holiday 2015 content encompasses files/folders from Weeks 44-47, structured independent of the standard document/folder structure | Packages   * details to follow |
| Document mgmt. | I should be able to upload videos and/or video players (i.e. .swf, .mp4). | file upload |
| Document mgmt. | I should be able to upload PDF documents. | file upload |
| Document mgmt. | I should be able to upload .xls, .xlsx documents. | file upload |
| Document mgmt. | I should be able to call out/feature specific, high priority documents. e.g. Urgent | Urgent toggle (off by default) |
| Document Mgmt. | I should be able to set a start and end date/time for a document, controlling its visibility to users. | Assign start time (mandatory)  Assign end time (optional) |
| Document Mgmt. | I should be able to assign a user-friendly label to any document I upload. (But the filename should be leveraged as a starting point/default.) | Assign document titles (intelligent default) |
| Document Mgmt. | I should be able to change a document title. | Edit document titles |
| Document Mgmt. | I should be able to upload multiple files at once. | Multi-file upload |
| Document Mgmt. | I should be able to edit/assign all document titles during the same process. | Multi-file upload metadata assignment |
| Document Mgmt. | I should be able to edit/assign all document start/end dates/times during the same process. | Multi-file upload metadata assignment |
| Document Mgmt. | I should be able to overwrite a document. | Document overwrite |
| Document mgmt. | I should be able to associate any particular content with specific stores. | Tagging (Stores) |
| Prioritized content | I should be able to manage a homepage that features:   * Featured content “packages” * Quicklinks | Homepage |
| Prioritized content | I should be able to re-order content within the Featured content area. | Package re-order |
| Prioritized content | I should be able to re-order links within the Quicklinks content area. | Quicklinks WYSIWYG editor |

### As Communications Manager

|  |  |  |
| --- | --- | --- |
| **Category** | **Story** | **Feature(s)** |
| Communications | I should be able to create communications “posts” with rich text formatting. | Communications template:   * metadata fields * WYSIWYG HTML editor |
| Communications | I should be able to attach/reference relevant documents already present in the document repo. | Communications template:   * attachments |
| Communications | I should be able to tag communications posts as being targeted for specific stores or All stores. | Communications template:   * Tagging |
| Communications | I should be able to optionally email a copy of a post to targeted stores and/or arbitrary email addresses. | Communications template:   * Send message toggle * Send date/time field * recipients |
| Communications | I should be able to manage selectable subsets of recipients for communications. | Admin:   * email recipients management |
| Communications | I should be able to optionally attach any documents referenced within the post to the email. | Communications template:   * include attachments toggle * attachments |
| Communications | I should be able to set a reply-to address, and it should have a configurable default value. | Communications:   * email sender/reply-to field   Admin:   * email sender management |
| Communications | I should be able to view past sent/yet-to-be-sent communications. | Communications Admin |
| Communications | I should be able to re-send a document, possibly to different recipients. | Communications re-send |
|  | I should be able to edit a communication. | Communications edit |
| Alerts | I should be able to create Alerts as a specific subcategory of Document, with its own top-level folder. | [ Alerts are basically normal documents with an additional field: alert type ] |

### As a User

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Category** | **Story** | **Feature(s)** | **Built** | **Tested** | **Live** |
| Document Viewing | I should be able to easily browse for specific documents/content by navigating the structure/folders presented to me. | Document Library browser |  |  |  |
| Content Browsing | When browsing content, I should always know where I am (within the context of the site). | Breadcrumbs w/i Featured Content especially |  |  |  |
| Content Discovery | High-priority content should be obvious to me. | Homepage |  |  |  |
| Document Search | I should be able to search for content explicitly. | Search bar  Search results template(s) |  |  |  |
| Document Search | I should be able to search within the site section I’m in. | Contextual Search  e.g. Communications, Holiday Package, Document Library, Alerts |  |  |  |
| ~~Document Search~~ | ~~I should be able to easily filter search results:~~   * ~~by type/folder~~ * ~~by store~~ * ~~by date range~~ * ~~by week (fiscal)~~ * ~~by year (fiscal)~~ |  |  |  |  |
| Document Search | I should be able to sort search results:   * [default] by date - Descending/Ascending * alphabetically by title - Descending / Ascending * alphabetically by folder/location - Descending / Ascending * by type (if Alerts) - Descending/Ascending | Seearch results column sort |  |  |  |
| Document Search | I should be able to “back out” of search results and return to where I initiated the search. |  |  |  |  |
| ~~Document Viewing~~ | ~~I should be able to apply filters to available content/search results.~~ |  |  |  |  |
| Document Viewing | I should be able to view, print or save/download PDFs. | PDF Viewer modal |  |  |  |
| Document Viewing | I should be able to watch (and listen to) video files. | Video player modal |  |  |  |
| Document Viewing | I should be able to download Excel files. | Excel link |  |  |  |
| Document  Viewing | I should be able to provide feedback to content creators easily. | Feedback form |  |  |  |
| Content Discovery | I should be able to easily locate content of high importance. | Homepage, Communications, Alerts, Store filter toggle, store select |  |  |  |
| Content Viewing | I should be able to filter out content (globally) that isn’t relevant to me/my store. | Store filter toggle, store select |  |  |  |
| Content Viewing | The site should know which store I’m in by default. If it doesn’t, I should be able to select my default store. | Store awareness, store select |  |  |  |
| Content Viewing | I should be able to switch between Atmo and SC content if I work in a Combo store. | Banner switch |  |  |  |
| Content Discovery | I should be able to access a feed of all recently uploaded, in-window, content. | Latest Updates (formerly Notifications) |  |  |  |

# Sample Mockups - Release 1.0/1.1

|  |  |
| --- | --- |
| Dashboard (Homepage) | Feature Landing |
| Communications Landing | Communications Detail |
| Alerts Landing | Document Library Landing |
| Document Library - Full Depth |  |